

# Host a Bluebeam Studio Session

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The following will guide an individual on how to set up and host a Bluebeam Studio Session for SDDOT/FHWA reviews using SDDOT best practices. Hosting a Bluebeam session is not limited to only SDDOT/FHWA reviews, the following can also be easily adapted anytime where collaboration on a project might be desired. It can be developing a work order or give any individual the ability to view and or comment on an issue. A studio Session is simple to start and a report can be generated for documentation.

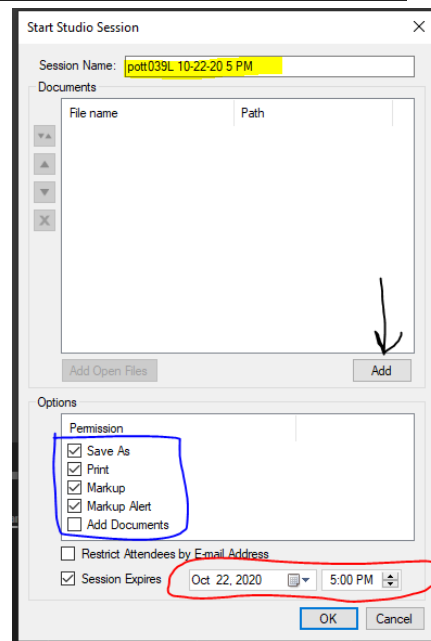
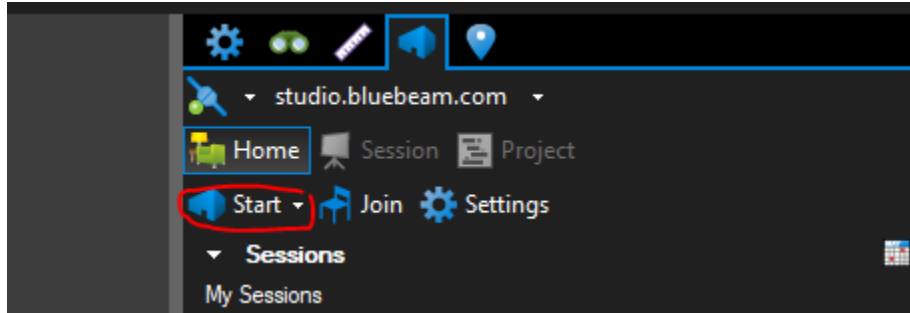
## SDDOT Best Practices:

- Adding individual documents such as Special Provision Checklist, PCN#\_SectionA, PCN#\_SectionB etc. to the review session. The individual pdf's allow reviewers a more systematic and simplistic approach when reviewing large review sessions that are common with Section Method reviews. It also gives the host some freedom to start a review session when not all documents to be reviewed are available; this is not ideal but does give flexibility to the host. The larger the review the larger the benefit is to our reviewers to have the pdf's separated out by Session Cover Letter, Checklists, Special Provisions and Plan Sections. When hosting a NonSection Method review keep the PCN#\_NonSection separated from the Session Cover Letter, Checklists and Special Provisions
- Send Review Sessions out through Outlook and not through Bluebeam Revu. When Bluebeam Revu sends invitations out it is difficult for the host and especially to invitees to see who was all invited, this is important for offices that forward invites on to all their office reviewers. Also, when Bluebeam Revu sends invitations out, they are received in SDDOT Outlook Inbox as an "EXT" email and has resulted in invitees missing reviews.

# Start SDDOT electronic plan review session

The Host will need to start a Studio Session.

- In the Studio tab select “New Session” in the drop-down menu under “Start”.



- In the “Start Studio Session” dialog box
  - Session Name: (Highlighted in Yellow) CPCN# Review Due Date Time, Example - Penn00WZ 08-15-18 5 PM
  - Pdf’s can be added multiple ways (Black Arrow)
    - Add Open Files – This adds files that are currently opened in Revu
    - Add – This add files through file explorer
    - Add files later after the Session has been started (See Below “Adding Documents in a Session”)
- Options – Can be adjusted after the Session has been started (Circled in Blue)
  - Permission
    - Check “Save As”
    - Check “Print”
    - Check “Markup”
    - Check “Markup Alert”
    - Do Not Check “Add Documents”

- **Do Not** Check “Restrict Attendees by E-mail Address”
  - This allows SDDOT best practice of forwarding e-mail to others that need to review the plans
- Check “Session Expires” (Circled in Red)
  - Use Drop down Menus to set Date and Time
  - Session Expiration can be adjusted during the review (see “Managing a Review Session”)
- Select “OK”
  - “Session Invitation” will open.
- In the “Session Invitation” dialog box
  - A (SDDOT Best Practice) is to send out reviews through Outlook and by selecting “OK” Bluebeam Revu populates an email with information entered and sends out the invitations. These invitations from Bluebeam cannot be tracked or documented. When exiting out of the “Session Invitation” dialog box always select “Cancel”.

Session Invitation

Session Information

Session Name: pott039L 10-22-20 5 PM

Session ID: 217-117-576

Copy Invitation

Invitees

E-mail Address

Address Book...

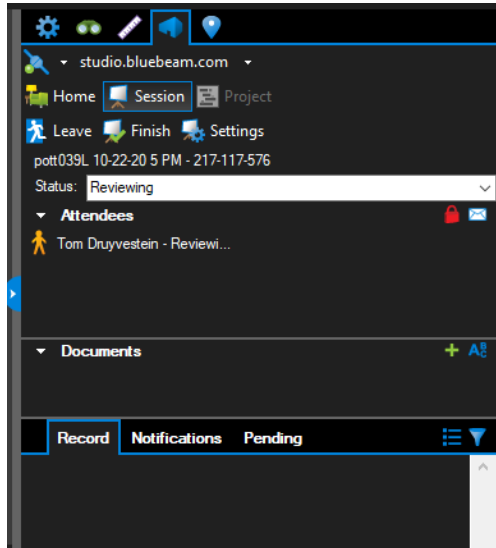
Message (Optional)

Note: A Session is limited to 500 Attendees.

OK Cancel

# Managing SDDOT electronic plan review session

The Host will need to manage a Studio Session Review. This includes sending the review out to possible reviewers and allowing others to view who all the review was sent to.



In the Session the name of the review is shown, set your status to “Reviewing, Finished etc.”, send invitations out via a copied link, add documents to the review and manage the review through the settings.

## Session Invitations Through Outlook

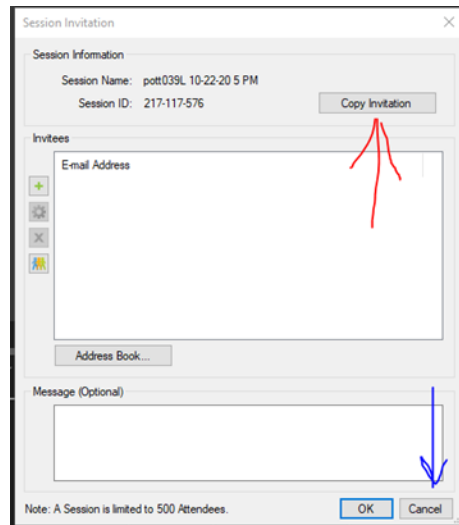
Create an Outlook e-mail:

Subject: You’re Invited to Review CounPCN# Review Due Date Time

Email Body:

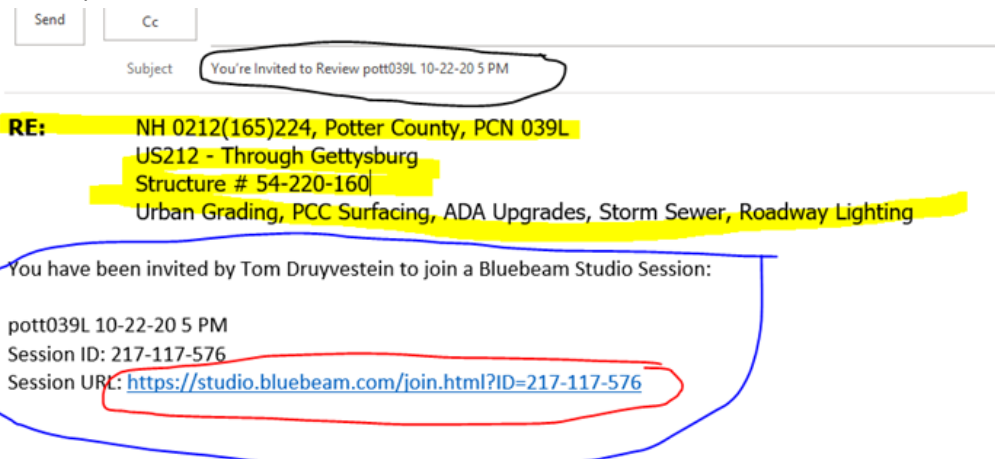
- Reference the project
  - RE:      Project Number, County, PCN  
             Location Description  
             Improvement Description
- Copy Invitation and paste into email
  - To open Session Invitation dialog box click the Invite (envelope icon) at the top of the Attendees section in the studio session.

- Select the “Copy Invitation”, then paste into the Email Body.



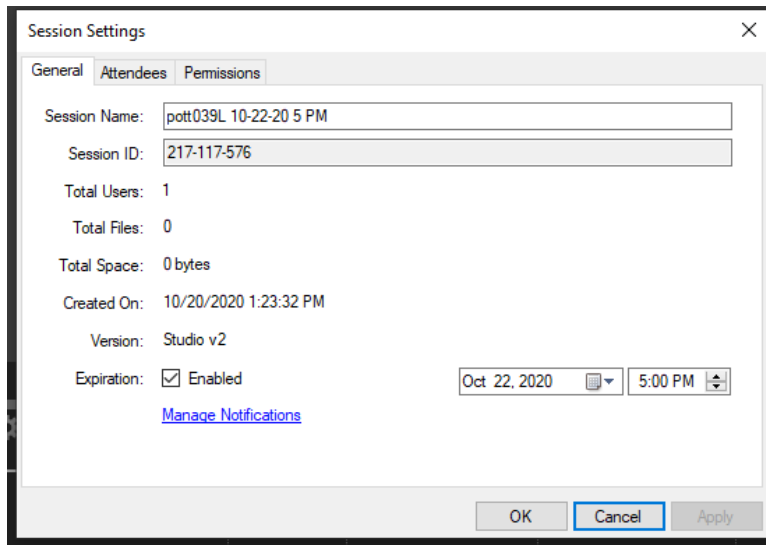
- Finally, close out of the Session Invitation dialog box by selecting “cancel”.

- Email Example



## Studio Session Management

The review session can be managed through “Session Settings” in the studio session



The screenshot shows the 'Session Settings' dialog box with the 'General' tab selected. The dialog has three tabs: 'General', 'Attendees', and 'Permissions'. The 'General' tab contains the following information:

- Session Name: pott039L 10-22-20 5 PM
- Session ID: 217-117-576
- Total Users: 1
- Total Files: 0
- Total Space: 0 bytes
- Created On: 10/20/2020 1:23:32 PM
- Version: Studio v2
- Expiration: ☒ Enabled
- Expiration Date/Time: Oct 22, 2020 5:00 PM
- [Manage Notifications](#)

At the bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Apply'.

(must select apply for any adjustments made)

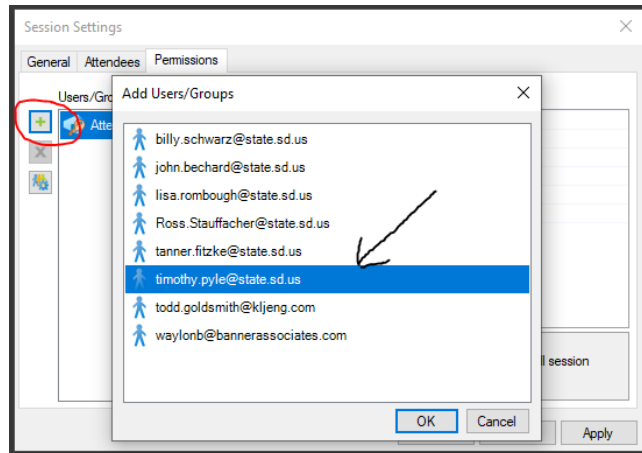
**General Tab:** Enable the session to close (expiration) and select the closing date and time, can also manage session notifications in this tab.

**Attendees Tab:** Can add attendee by email and restrict attendees

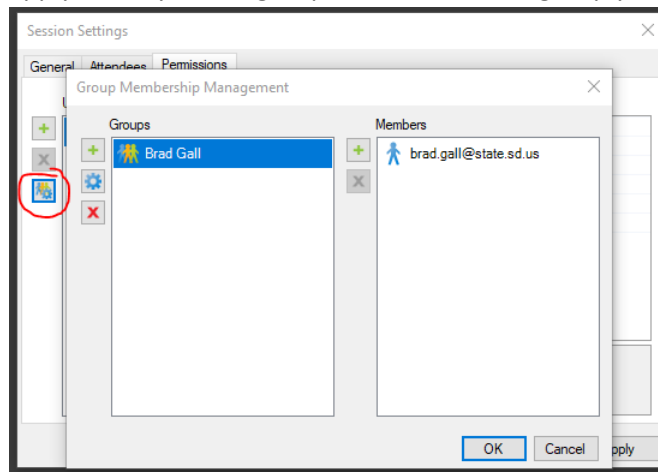
**Permissions Tab:** Set permissions to attendees

- During the Markup portion of the review session set permissions for all to:
  - Save As **Allow**
  - Print **Allow**
  - Markup **Allow**
  - Markup Alert **Allow**
  - Add Documents **Deny**
  - Full Control **Deny**
- During the Revision portion of the review session set permissions for everyone except project designers to: (simply change “Attendees” permissions)
  - Save As **Allow**
  - Print **Allow**
  - Markup **Deny**
  - Markup Alert **Allow**
  - Add Documents **Deny**
  - Full Control **Deny**
- During the Revision portion of the review session set permissions for project designers to:
  - Save As **Allow**
  - Print **Allow**
  - Markup **Allow**

- Markup Alert **Allow**
  - Add Documents **Deny**
  - Full Control **Deny**
- This is accomplished through using permissions tab, use the green plus icon then select individual you want to change preferences for.



- **NOTE:** Sometimes designers do not enter the session during the markup portion of the review. This results in them not being populated in the “Add Users/Groups” automatically.
- To “Add Users/Groups” manually, use the “Group Membership Management” icon to create a group and populate it with members, select OK then select apply. Now you can give permissions to the group you just created.

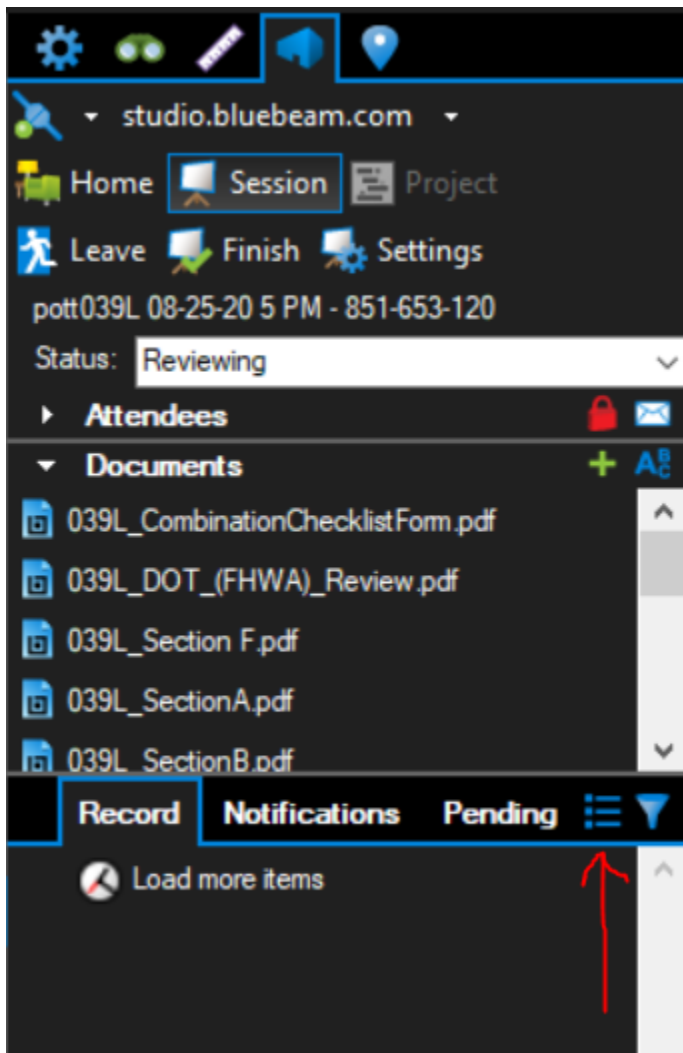


## Adding Documents to a Session

- Adding documents can be accomplished through the “Add File” Icon (+). This will route you through your file explorer capabilities on your computer.

## Creating Review Session Report

- After the plan review and all the responses are complete the Host will need to generate a Session Report. Click the Report icon in the Record tab for the Review Session.



- In the Session Report dialog box select
  - PDF Package Report
  - Letter
  - Include Attendees List
  - Include Documents List
  - Include Filtered Record Items
  - Columns Box check all
  - When you select "OK" you will need to save the report in the "Report" folder under the project folder titled COUNPCN#\_archive. Example CLAY023V\_archive



Session Report

Type

☐ Record Summary

☒ PDF Package Report

☐ Combine Files Report

Options

Title: pott039L 08-25-20 5 PM

Notes: Note

Page Size: Letter

☐ Portrait ☒ Landscape

☒ Include Attendees List

☒ Include Documents List

☒ Include Filtered Record Items

Columns

☒ Date

☒ Time

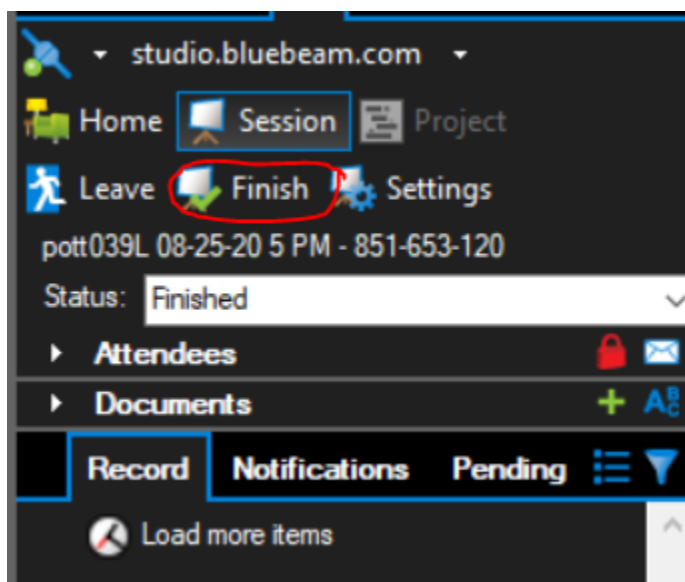
☒ Document

☒ Page

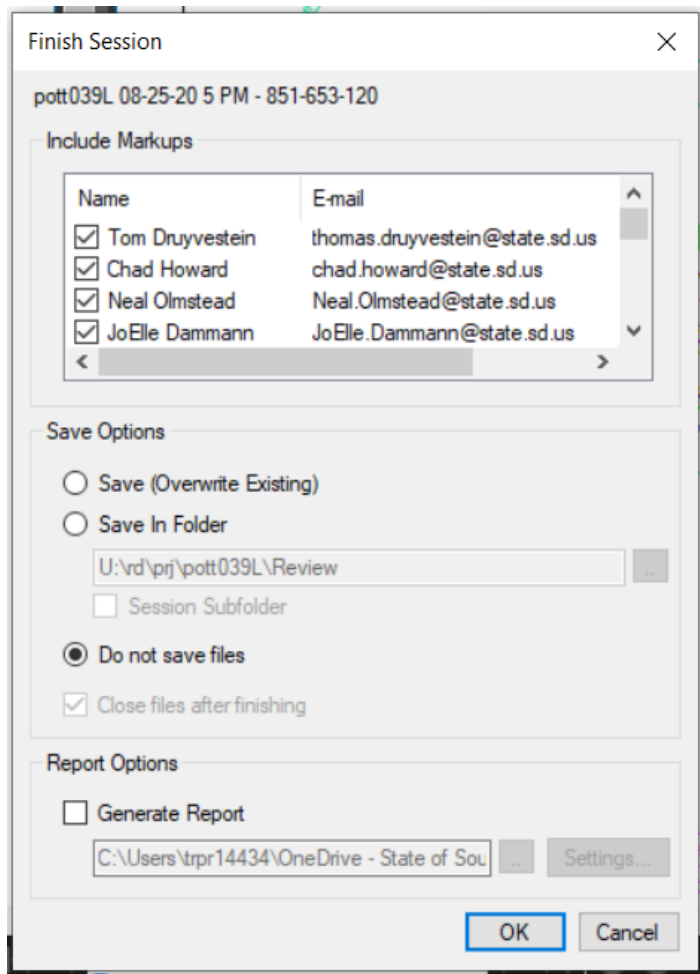
OK Cancel

## Finish SDDOT electronic plan review Session

The Host will need to finish a Studio Session. Select the Finish icon in the Review Session.



In the “Finish Session” dialogue box, select “Do not save files” and uncheck the “Generate Report”



The "Finish Session" dialog box is shown with the session ID "pott039L 08-25-20 5 PM - 851-653-120". It contains three main sections: "Include Markups", "Save Options", and "Report Options".

**Include Markups**

Name	E-mail
<input checked="" type="checkbox"/> Tom Druyvestein	thomas.druyvestein@state.sd.us
<input checked="" type="checkbox"/> Chad Howard	chad.howard@state.sd.us
<input checked="" type="checkbox"/> Neal Olmstead	Neal.Olmstead@state.sd.us
<input checked="" type="checkbox"/> JoElle Dammann	JoElle.Dammann@state.sd.us

**Save Options**

☐ Save (Overwrite Existing)

☐ Save In Folder

U:\rd\prj\pott039L\Review

☐ Session Subfolder

☒ Do not save files

☒ Close files after finishing

**Report Options**

☐ Generate Report

C:\Users\trpr14434\OneDrive - State of Sou

Settings...

OK Cancel